

Executive Summary of New Jersey Broadband Survey

**(N=3,101 completed landline and cell phone interviews; Nov-Dec, 2010; English and Spanish)
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1. Summary

New Jersey ranks 12th among all states in terms of household broadband adoption (72%); this means that 28% – more than 850,000 New Jersey households – do not have broadband.

Demographically, broadband non-adopters are much more likely to be older, lower income, less educated, African-American and/or of Hispanic ethnicities, and clustered in urban areas.

Over 86% of household broadband adopters were either very (50%) or somewhat (36%) satisfied with their broadband service.

When asked whether the policy of “expanding affordable high-speed Internet access to everyone in the [state] should be a [priority] for our state government,” 61% indicated that it should be either a top (20.0%) or “important, but [a] lower” (41.1%) priority.

These findings underscore the importance of the future work under the planning component of this project to study outreach programs in urban areas to facilitate understanding of what programs are most effective and cost efficient, to help determine the what kinds of training programs and related initiatives would yield the highest return in terms of broadband adoption. The remainder of this Executive Summary highlights some findings that will be of use in supporting and guiding state-level broadband initiatives.

2. Reasons Given that Household Broadband Adoption is Important (Sample, New Jersey Cross-section, N=2,253)

Respondents indicated that “people who do not have high speed Internet access at home” were at a disadvantage in the following areas (percentage of sample agreeing):

- Telecommuting or working from home (71.7%)
- Finding out about job opportunities or gaining new career skills (69.3%)
- Education (67.4%)
- Using government services (59.0%)
- Learning new things that might improve or enrich your life (62.2%)
- Getting health info (57.9%)
- Keeping up with news and information (47.5%)
- Keeping up with what is happening in your local community (46.4%), and
- Shopping (44.4%).

3. Reasons Given for Nonadoption (Sample, Broadband Nonadopters, N=1,241)

There are four identifiable bases for nonadoption:

1. Lack of Inclination: Over four in ten of all non-adopters – 41.2% – report their “main reason [they] don’t use the internet or email” is either that they’re “just not interested,” “don’t need it/ don’t want it,” “it’s a waste of time,” or they’re “too busy/just don’t have the time.”
2. Lack of resources: Just under one-third – 30.4% – state their main reason as either “it’s too expensive,” “don’t have a computer,” “don’t have access,” or assert that while they don’t currently use it, they’re “getting it.”
3. Lack of training or skill: 16.1% of non-adopters report it’s “too difficult/frustrating,” they “just don’t know how,” or that they’re “too old to learn” as their main reason for non-adoption. Only 24% to 28% of nonadopters report using a computer at any time on at least an occasional basis, or that they ever did so, or would like to do so in the future. Over half (53.5%) indicate they “would need someone to help” them with computers or technology to start using the Internet.
4. Fear of Technology: 5.10% – or 53 respondents – report their main reason for non-adoption is worry about “computer viruses,” “spam” “spyware,” “adware,” “privacy,” or that “it’s an evil thing,” or, simply, “religion.”

4. Survey Validation and Partial Specifications

The estimates obtained by the *New Jersey Broadband Survey* are consistent with and validated by current estimates published by the U.S. Department of Commerce, National Telecommunications and Information Administration in its February 2011 NTIA Research Preview, “Digital Nation: Expanding Internet Usage.” Based on the October 2009 Internet Use Supplement to the Current Population Survey (nationwide N=54,000 households), the NTIA shows a point estimate for household broadband adoption in New Jersey for 2010 at 73.3% with a +/- 1.90% sampling error at 90% confidence. That point estimate and the 72.4% household broadband adoption estimate determined by this study diverge by less than one percentage point.

The *New Jersey Broadband Survey* is a cross-section of all New Jersey households (N=2,253), as well as a targeted (N=1,241) oversample of broadband non-adopters; the cross-section allows low-sampling-error point estimates of characteristics of the populations of households in the State; the oversample allows for low-sampling-error subgroup analyses to best determine models of the characteristics and decision-processes of those who decline to adopt broadband at the household level. To assure that the responding individual was knowledgeable about broadband-related issues in the household, potential respondents were screened to identify the utility and service bill payer in the household and were then sorted into broadband-adopters, dial-up users only, or non-internet adopters.